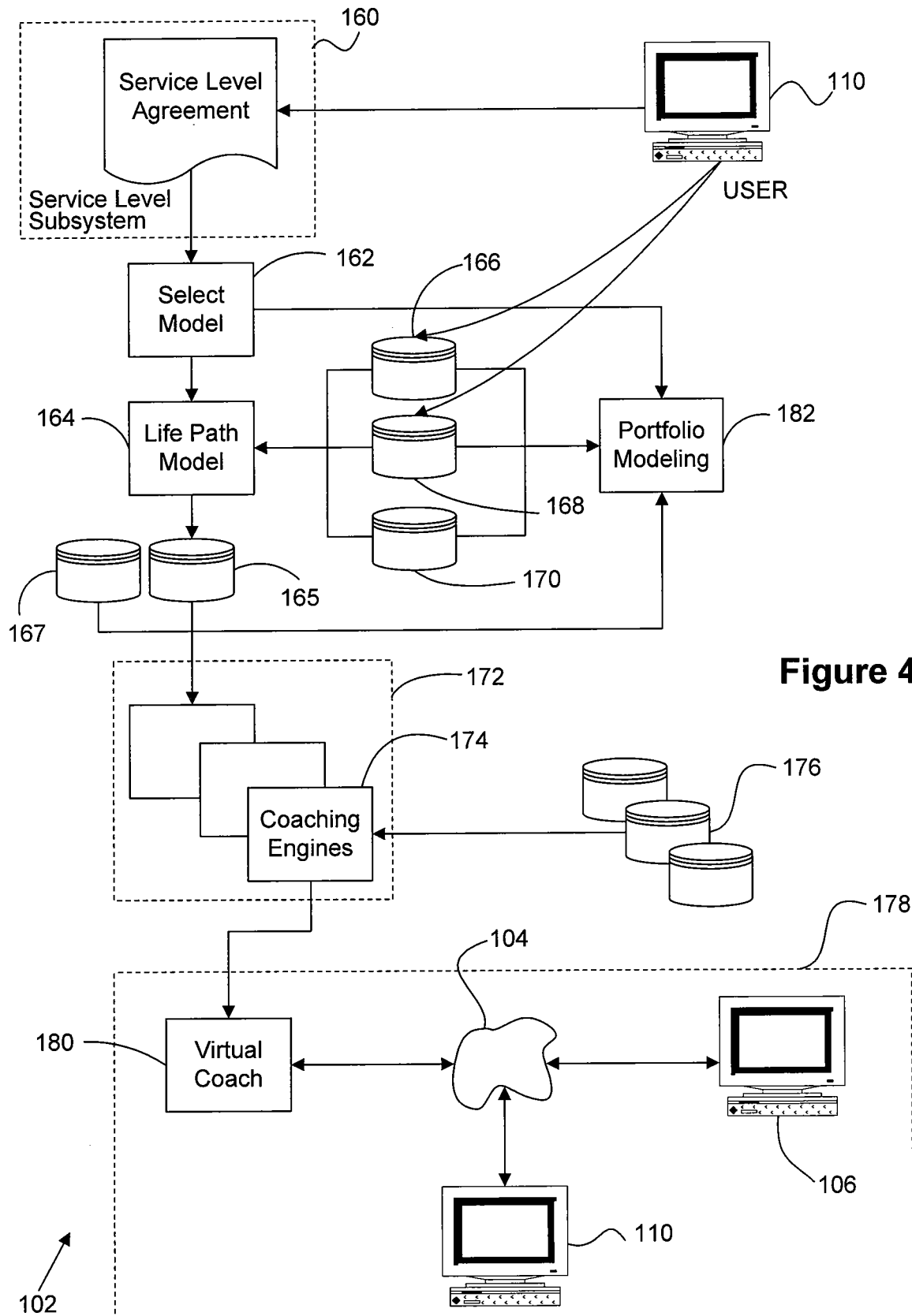
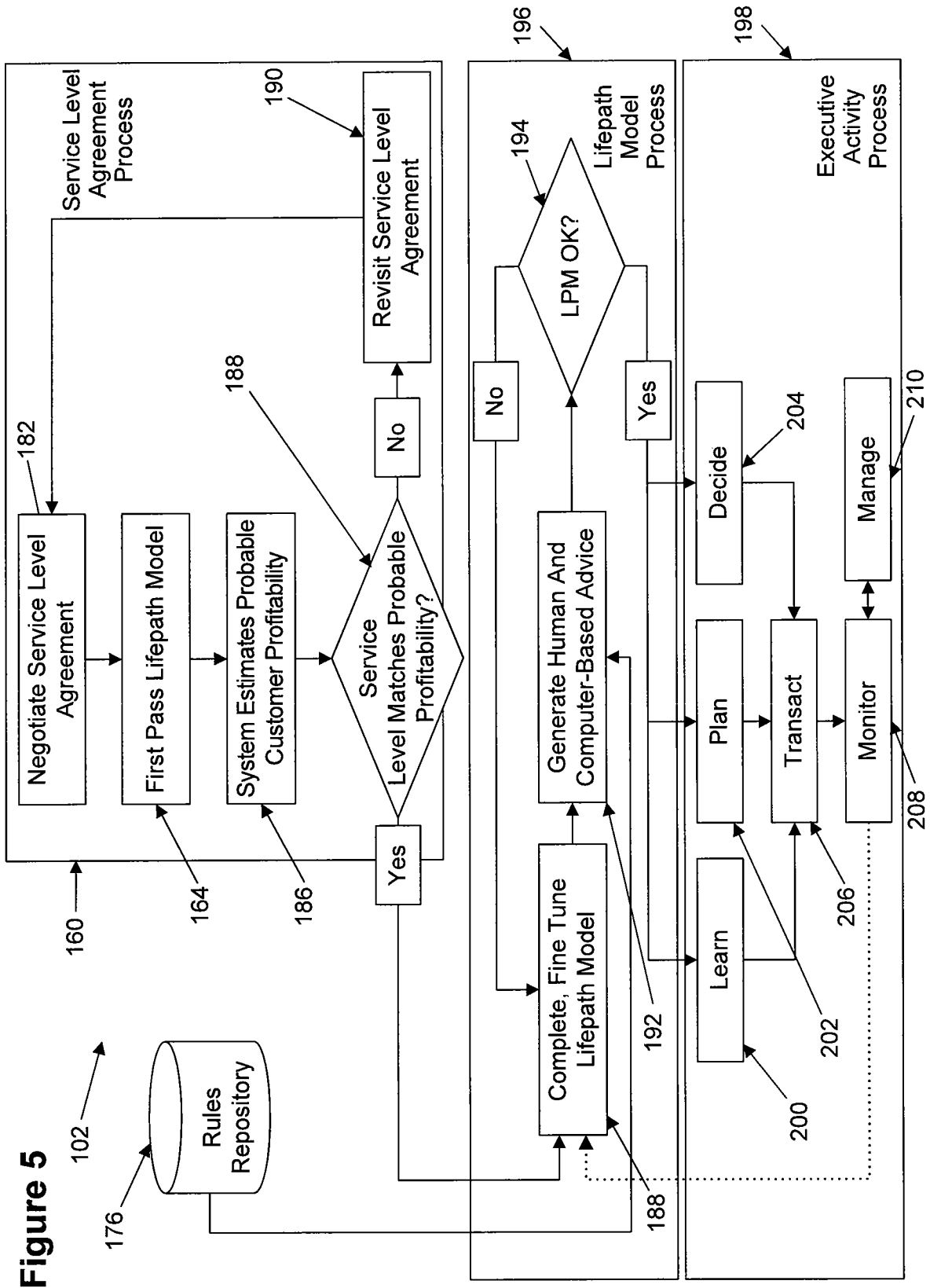


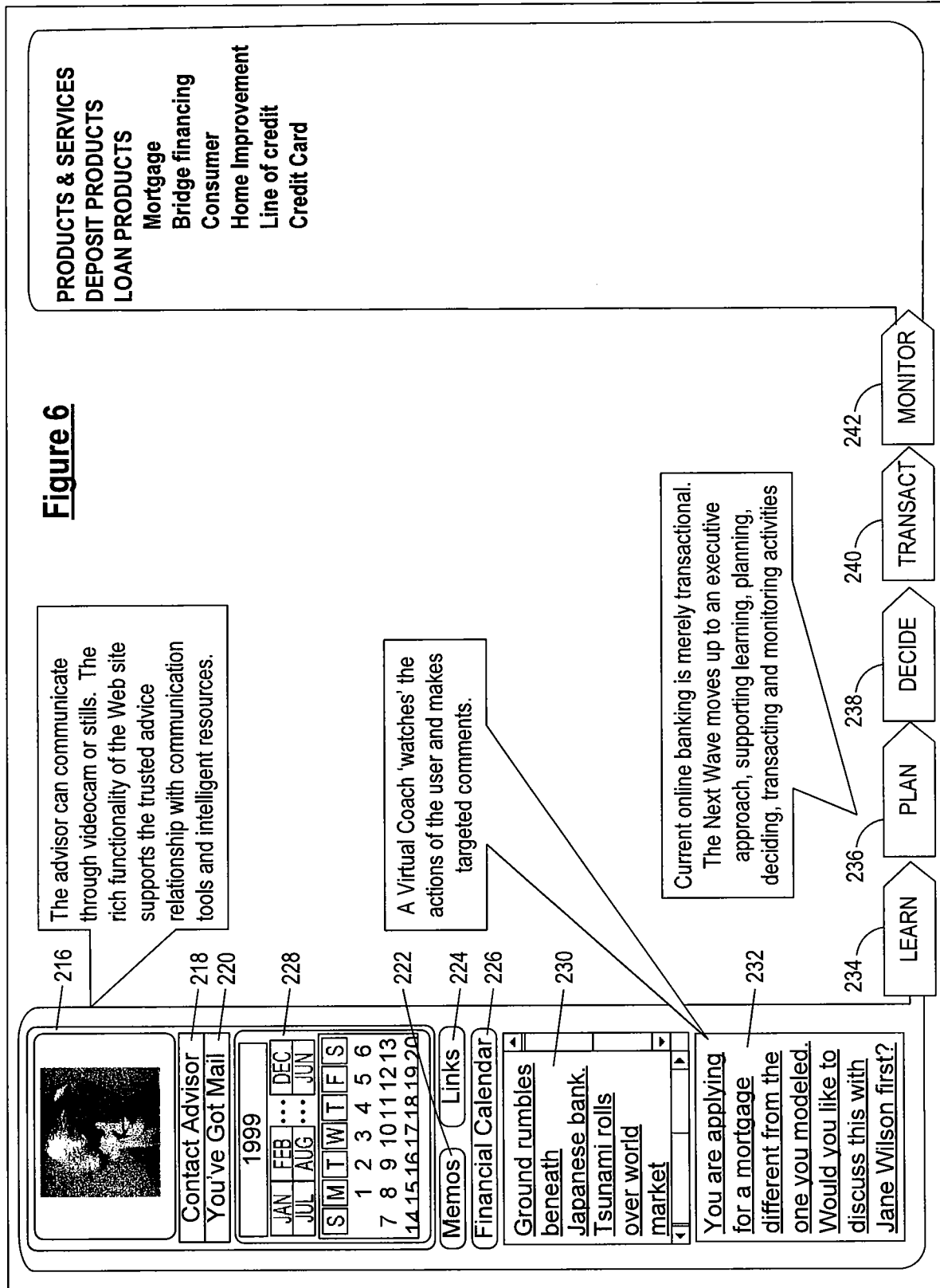
REPLACEMENT SHEET




REPLACEMENT SHEET



REPLACEMENT SHEET



# REPLACEMENT SHEET



216

Contact Advisor

You've Got Mail

1999

JAN

FEB

...

DEC

JUL

AUG

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JUN

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F

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20

Memos

Links

Financial Calendar

Ground rumbles beneath Japanese bank. Tsunami rolls over world market

You are applying for a mortgage different from the one you modeled. Would you like to discuss this with Jane Wilson first?

PLAN: 248

LIFE PATH MODEL

Both your home purchase and your children's education are pushing you into the red. Revisit your home purchase plans and consider a tax deferred education savings plan.

PERSONAL RISK MODEL

Include any combination of factors in your risk model

● JOB LOSS

● DISABILITY

● CASUALTY MARKET

● DOWNTURN

● DIVORCE

● THEFT

● FIRE

● COLLISION

244

247

250

RUN THE MODEL

REVENUE

EXPENSES

246

Press each button in turn to do a Life Path for all sources of revenue and expense...

SALARY

INVESTMENT

PENSION

ALIMONY

DISABILITY

ANNUITY

RRIF

FEES

LOAN

OTHER

HOUSING

TRANSPORTATION

ENTERTAINMENT

EDUCATION

HEALTH CARE

VACATION

SAVINGS

PERSONAL

INVESTMENT

INSURANCE

TAX

LOAN

MONITOR

TRANSACTION

DECIDE

PLAN

LEARN

249

PRODUCTS & SERVICES

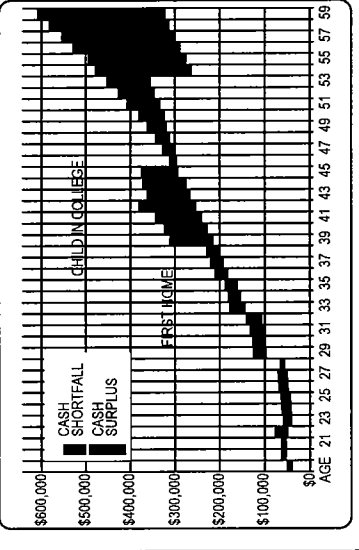
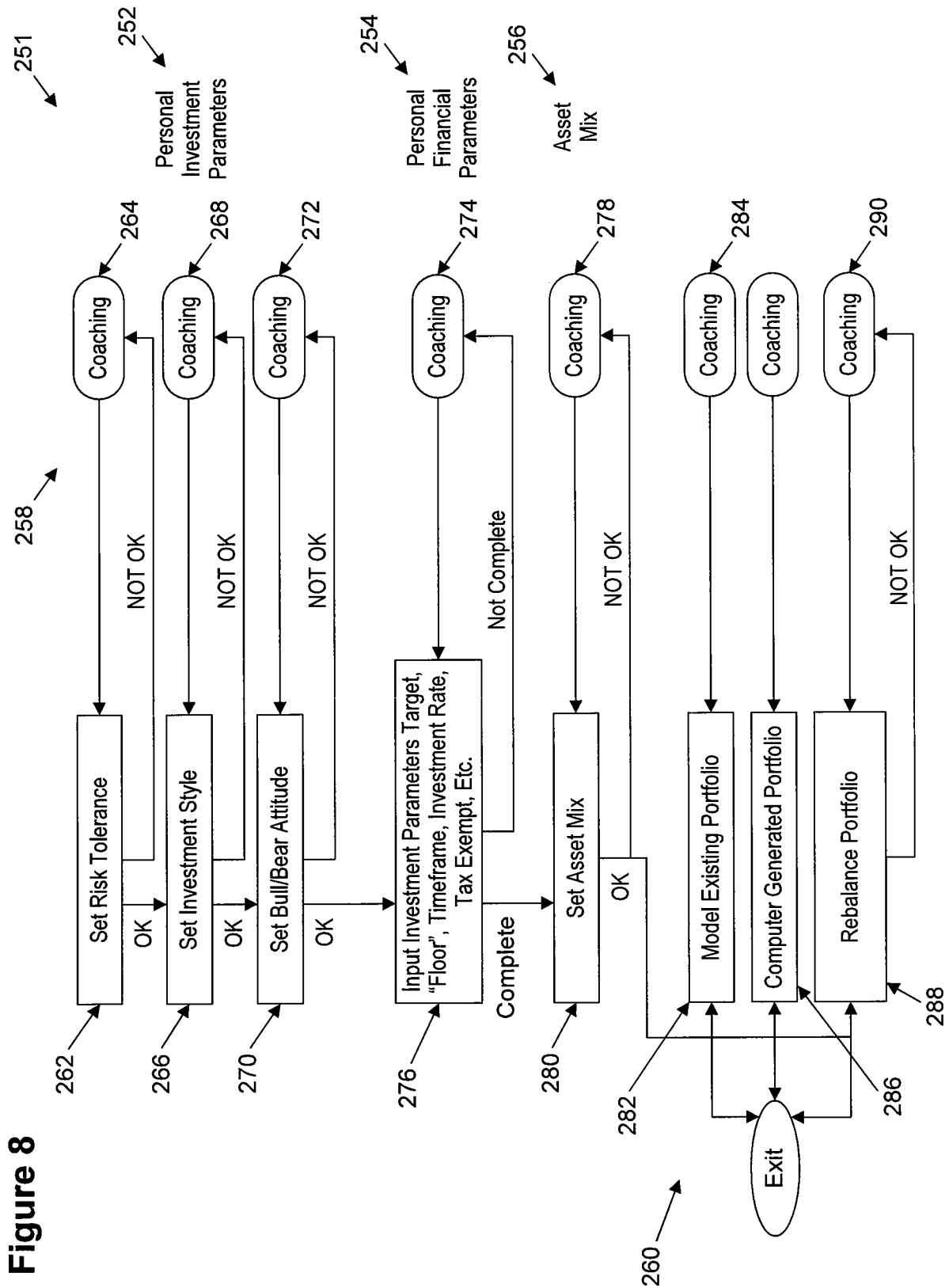


Figure 7

REPLACEMENT SHEET



REPLACEMENT SHEET

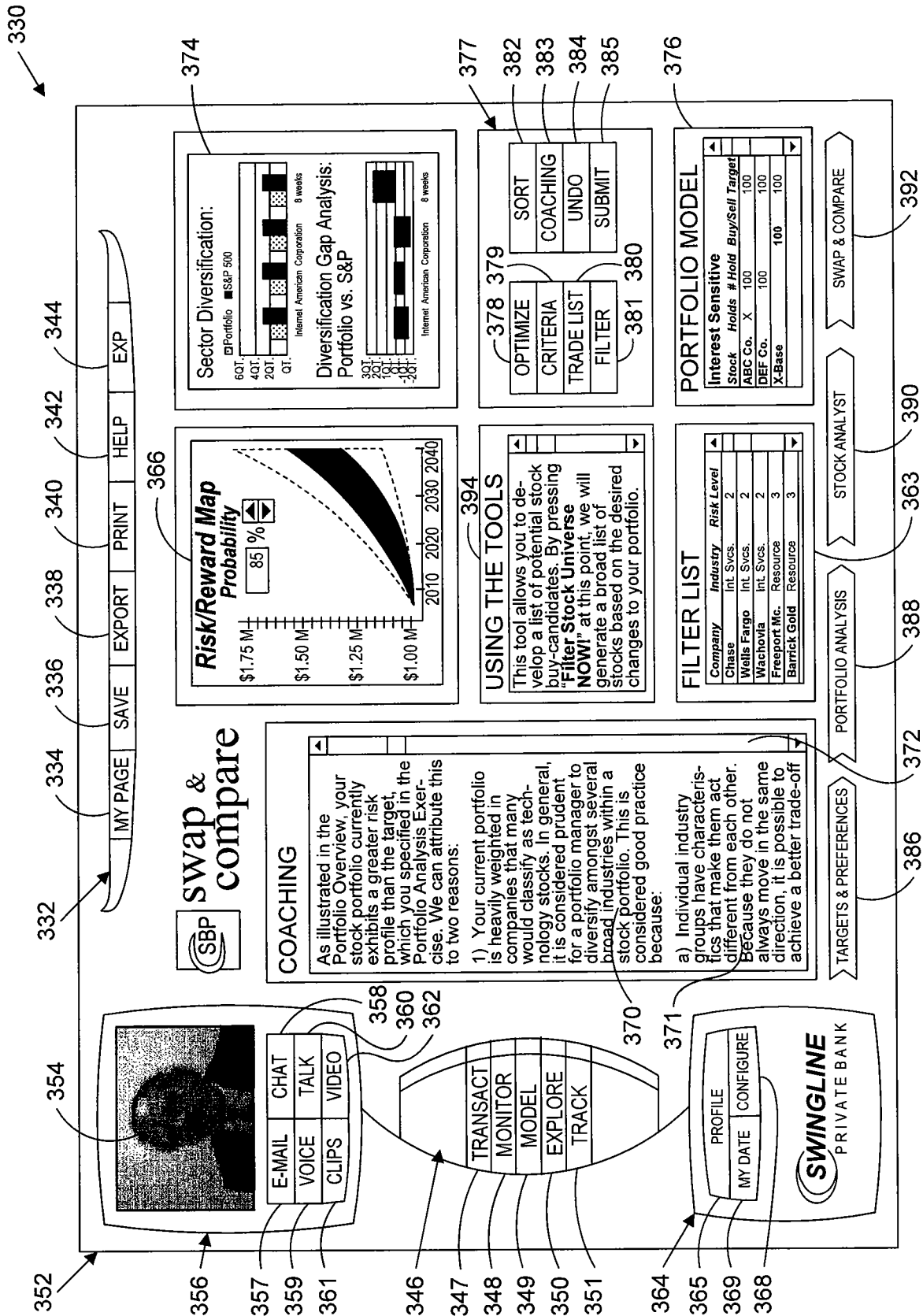


Figure 11